# eMARS Agency Implementation Guide (AIG) Release One
# October 18 -19, 2005

# Agenda – AIG Release One Session

- Welcome and Introductions
- Goals of Session
- Q&A Process
- AIL Roles and Responsibilities
- eMARS Tools and Resources
- AIG Overview
- Overview of Agency Implementation Activities
- Next Steps
- Key Dates
- Questions

# Goals of AIG Release One Session

- Review the role of an AIL

- Review the structure and uses of the AIG

- Review how updates of the AIG will be released

- Review how the AIG will guide the Agencies in preparing for the eMARS implementation.

- Review resources and tools for implementation

- Review Next Steps and Key Dates

- Note:  This session is not a detailed review of the various functional processes or other implementation activities.

# Q&A Process

- Please ask questions as we go along
- Parking Lot will include
  - Questions we need to table for time
  - Questions we need to table because they are coming up later in this presentation
  - Questions we need to research
- Q&A time at the end of session
- FAQ document will be created and posted on the eMARS web site to reflect questions from all sessions

# AIL Role and Responsibilities

# AIL Role & Responsibilities

## What is an AIL?

– Known as *"**Agency Implementation Lead**"*

– *An individual who plays a vital role in the success of the eMARS implementation within your agency*

# AIL Role & Responsibilities

**What does an AIL do?**
  ***Some major responsibilities of an AIL include:***

- Serve as the ***liaison*** between and within your agency and the eMARS Project Team

- ***Coordinate and monitor*** implementation and post-implementation efforts of eMARS throughout your agency which includes:

  - Tasks associated with Agency Implementation

# AIL Role & Responsibilities

**What does an AIL do?**
*Some major responsibilities of an AIL include:*

- Ensure all information disseminated to the eMARS Team accurately represents your **agency's needs**
  - Training Needs Assessment Survey
  - Decentralized Chart of Account Structure Decisions
  - Etc...

- Provide **timely** submission of your agency's information to the eMARS Team
  - Pre go-live – May 15, 2006
  - Go Live – July 1, 2006

# AIL Effectiveness

**How to RATE your effectiveness as an AIL:**

$\mathcal{R}$**esponsiveness** – your involvement is essential to ensure your agency is represented throughout the eMARS project

$\mathcal{A}$**ccuracy** – ensure the information you provide accurately depict your agency's needs  *Do not guesstimate*

$\mathcal{T}$**imeliness** – providing information within the requested timeframe will prevent unnecessary delays and ensures your agency's needs have been included in the eMARS project efforts

$\mathcal{E}$**ngaging Others** – involving others makes for a smoother implementation for your agency

# eMARS – AIL Tools and Resources

- eMARS Website
  - http://finance.ky.gov/internal/emars
  - Continuous updates throughout the project
  - Visit frequently
- eMARS Project Contacts
- eMARS Newsletters and Presentations
- Agency Implementation Guide
  - Implementation Roadmap for AILs
  - Includes implementation forms and task checklists
  - Key Dates
- Other eMARS plan documents

# Agency Implementation Guide (AIG) Overview

# AIG – What it Provides an AIL?

- Background Information of the eMARS implementation

  – Overviews of business functional areas such as Chart of Accounts, General Accounting, Travel, etc.

  – Overviews of implementation activities such as Interfaces, Reporting, and Security and Workflow

  – Overall view of your agency's implementation activities with key dates

  – Key eMARS organizational information

# AIG – What it Provides an AIL?

- Roadmap for implementation

  - Background information for each stage of implementation

  - Detailed step by step tasks to complete each stage of implementation

  - Checklists to track task completion

  - Forms to facilitate gathering information

# AIG – How is it Organized?

- Section 1 – Introduction
  - Outlines the purpose, use, key dates, and maintenance of the AIG
- Section 2 – eMARS Implementation Approach
  - Overview of the implementation process
- Section 3 – Project Organization
  - Overview of the eMARS project and agency team structure, roles, responsibilities, and communications process.
- Section 4 – eMARS System Overview
  - Overview of functional and technical areas

# AIG – How is it Organized? (Continued)

- Section 5 – eMARS Enterprise Model
  - Detailed descriptions of business processes including process flows

- Section 6 – Implementing eMARS at an Agency
  - Detailed step by step tasks to complete each stage of implementation
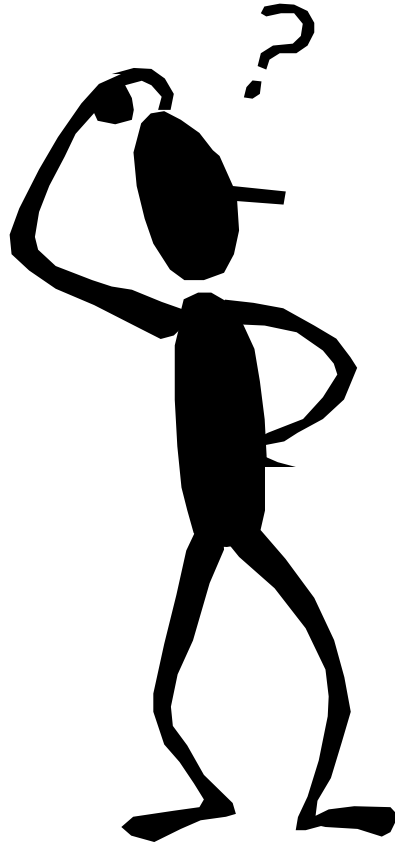
- Glossary and Appendices

# AIG – How is it Maintained?

- There are three major Releases
  - Release One – October
  - Release Two – November
  - Release Three – December
- Additional Changes (not in a Release)
  - Notification of changes sent via e-mail
  - Post updated version on the eMARS web site
  - Only the most recent version will be on the eMARS web site

Questions?

# Overview of Agency Implementation Activities (Section 6 of AIG)

# Implementing eMARS at an Agency

- ## Summary Implementation Matrix
  - Quick Reference of Implementation Tasks by Area

| Implementation Task Matrix | | | |
|---|---|---|---|
| **Responsible** | **Task #** | **Task Name** | **Checklists/Forms/Outputs** |
| AIL | 6.5.1 | Agency Goals and Objectives | • Statement of agency goals and objectives <br> • ID 1 on Agency SUA Checklist – C6.5 |
| AIL | 6.5.2 | Complete Planning Questionnaire | • Completed eMARS Agency Implementation Planning Questionnaire <br> • ID 2 on Agency SUA Checklist – C6.5 |

# Implementing eMARS at an Agency

- **Specific Implementation Tasks in Release One**
    - System Usage Analysis
        - Organized by Functional Process Area
        - Analysis references process flows presented in Section 5
    - Interfaces
    - Reporting
    - Security and Workflow

# Implementing eMARS at an Agency

- Each Task includes:
  - Task Name and Reference Number
  - Responsible
  - Estimated Duration
  - Due Dates – references Key Dates
  - Description
  - Workproducts and Results
    - Checklists
    - Forms
    - Other
  - Resources and Inputs

# Implementation Task Overview

- **6.5.1 – Agency Goals and Objectives**
  - Develop Agency Goals and Objectives that can be supported by the eMARS implementation

- **6.5.2 – Complete Planning Questionnaire**
  - Planning questionnaire will assess your agency's use of MARS, and subsequently, eMARS.

- **6.5.3 – Refine Assignments/Schedule Meetings**
  - Help project team determine if there is a need for system usage analysis meetings to help agencies determine how to implement eMARS
  - Agencies will determine timelines, overlapping activities, and resource needs

# Implementation Task Overview (Continued)

- **6.5.4 – Gather MARS Agency COA Codes**
  - Identify the agency specific MARS COA elements used by the agency
  - How are the COA elements used today?

- **6.5.5 – Review Usage Analysis Technique**
  - Learn methods on how to complete system usage analysis.
  - Familiarizes agencies team members on their role in this process and the outcomes.

- **6.5.6 – Review Current Processes**
  - Review agencies current MARS processes. This makes identifying the impact of changes with eMARS more effective.

- **6.5.7 – Review eMARS COA Model**
  - Review the eMARS Chart of Accounts Plan
    - On the eMARS website
  - Note statewide COA elements
  - Note eMARS recommendations for agency COA elements

- **6.5.8 – Define Agency COA and Accounting Templates**
  - Map Agency specific COA elements
    - MARS → eMARS
  - Complete Form F6.5.8a (COA elements)
  - Complete Form F6.5.8b (Accounting templates)

# Implementation Task Overview (Continued)

- **6.5.25 – Issue Identification and Resolution**
  - Agency specific issues will be identified, tracked, and resolved.

# Agency Interfaces Implementation Tasks

- Section 6.6 of the AIG

- Interface training for Interface Leads and programmers completed in September

- Identify/confirm agency interfaces to eMARS
  - Including Check Writer interfaces

- Develop a workplan for designing, developing, and testing interfaces

- Interfaces must be submitted to the eMARS interface team for system test by December 31, 2005

- COT will be conducting XML training soon

# Agency Reporting Analysis Tasks

- Section 6.11 of the AIG
- Agency specific reports were identified earlier with the Reports Inventory Assessment survey (August)
- Identify Reports Lead and Team Members
- Determine the on-going need of the reports and the priority.
  - Needed for Implementation or Post-Implementation
  - Determine where a single report can be used as the foundation for other reports
- Complete Report Developer Training
- Develop a workplan for designing, developing, and testing reports

# Security and Workflow Tasks

- Section 6.12 of the AIG
- Identify Security and Workflow Lead, Team Members, and Testers
- Complete Security and Workflow Analysis Process Training
- Identify and Test Agency Specific Workflow Rules
- Assign Security Roles and Workflow Roles
- Assign Users to Security Roles and Workflow Approval Roles
- On-Going Maintenance of Security Roles and Workflow Roles

# Next Steps

- AIL and Implementation Team Training
  - Technology Based Learning (TBLs)
  - Independent Study Guides (ISGs)
- COA meetings
- Security and Workflow training sessions
- Grants Conversion sessions
  - Data cleansing of Federal fund balances
  - Conversion database for grants

# Key Dates

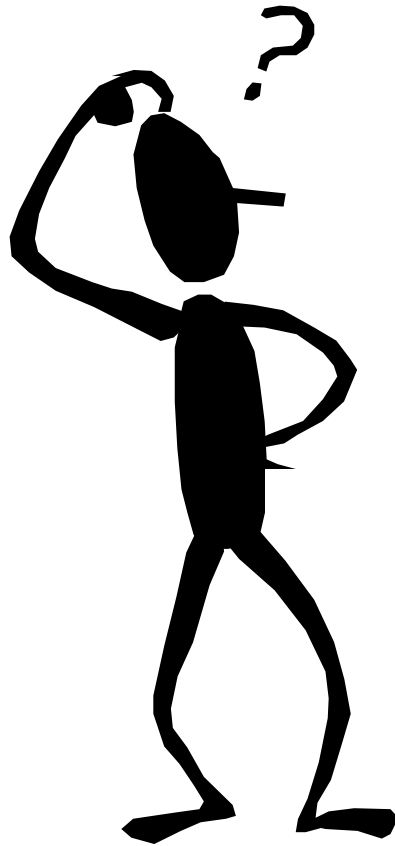- TBL/ISG Kickoff sessions                  Week of Oct. 24th
- AIG Release 2 session                    November 15 & 16
- COA Meetings                              Ongoing
- Grants Conversion sessions                         TBD
- Security and Workflow training           Late November
- AIG Release 3 session                   December 19 & 20

# *Get Your Implementation Team Organized !*

# eMARS AIL Kickoff – Q&A

Questions?

Break